

CASE STUDY USE IN UNIVERSITY CLASSES

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Abstract

A case study, tells a story of interactions in an organization that exists in the present time, or has existed in the past. Parts of the case may be fabricated to allow access to the problems or successes that the organization has had. Such cases have been used in university classes for more than 100 years and aid in presenting to students access to ongoing situations that show the use of theories taught in lectures and thus aid in understanding how theory relates to practice in life. Usually, there is a serious problem that students should identify and through their research be able to present solutions to the problems. In most case usage, students will be assigned to teams to work together on solutions, and then to present their solutions either orally or in writing for their professor to critique and give the students additional insight about the case. The intent of the team arrangement is to get all of the team members to work together to find a solution.

Key Words: Case Study, Case Teaching Method, Interactive Teaching & Learning

INTRODUCTION

An early book about teaching methods tells us, "It is generally believed that the case-study method was first introduced by Frederick Le Play in 1828 as a handmaiden to statistics in his studies of family budgets (Les Ouvriers Europeens). From that beginning, the case study method spread to many disciplines: Medicine, Psychology, Sociology, Business Management, Public Administration, Tourism, Military Campaigns, and many others. Using cases did not negate the use of theory in the classroom, but fortified it by showing how proper use of theory or non-use of theory affects live organizations. In fact, Eisenhardt determined that new theories can be created from case studies,

Case studies analyze persons, events, decisions, projects, institutions and/or systems to determine reasons for poor performance or excellent performance, In studying them, students can learn of best practices or practices to avoid in similar circumstances, The findings may not be universally applied, but they give indications of actions to avoid or emulate in similar circumstances,

One of the well known advocates of using case studies is the Harvard Business School. When the program began in the early 20th century, its faculty realized that there were no textbooks available for a graduate program in business. It solicited cases from leading business practitioners such as Chester Barnard (AT&T) and Elton Mayo (Western Electric) to provide actual research in organizations that could be written as cases. Since that beginning, the Harvard Business Schools's graduate program is heavily oriented toward large cases of 30 pages or more that teams of students study and analyze to

establish team solutions to problems uncovered in their research on the case. The cases are assigned for weeks in advance of the time for the team's presentation of solutions to problems, or praises discovered for good performance by the organization under study. Students, of course, utilize the theories they have learned when they are assigned to such a case.

One of the Harvard Business School's most revered professors, Dr. Paul Lawrence stated, "Case Studies present realistic situations, allowing students to balance theory with practices." This endorsement is found in Laurence's *Writing Case Studies: A Manual*.

Another champion, Dr. Hans Klein, former president of the World Association for Case Method Research and Application, has written, "During the past 30 years, the case method has enjoyed a steady and continuing increase in popularity and use. For example, applications in the field of education have increased...The international Association for Management Education, the American Accounting Association and many leaders in university-level business education encourage the use of the case method and other interactive techniques to more effectively reach students, especially undergraduate accounting students."

Case studies can vary in length and complexity depending upon the instructor's goals. They can be short (one or two pages) or long (20 or more pages). They can be lecture based or discussion based. They can be real with all detail obtained from organizations or partially fabricated by the author. They can require students to examine multiple aspect of a problem or only a single problem. They can require students to propose a solution to the case or simply identify the contributing problems (Eberly Center)

CASE STUDIES IN ACTION

In teaching both graduate and undergraduate students, I have frequently used case studies. When I was teaching Strategic Management to graduate students, I used large cases of twenty or more pages with the expectation of more depth in the analysis made by student teams. In teaching some undergraduate classes, I have used much shorter cases in which it is fairly easy to identify the problem to be solved and the student teams have a shorter time to meet and come up with their solution. In doing so, I usually am able to get the student teams to handle two or more cases in a semester and thus give them a somewhat broader experience of coming up with case solutions. In all instances, there is the requirement for all members of the team analyzing a case meet with the other team members to contribute to the solution and participate in the oral discussion of the teams findings..

Unfortunately, some team members try to avoid contributing and simply want to use the information that other team members have discovered. They are cheating themselves of an important learning opportunity and if I find out this was done, they also get a much lower grade than those who did the work in analyzing the case. It usually is difficult to determine if this has happened unless the instructor has the team members evaluate each other's contributions. I always did that when teaching strategic management cases.

In accordance with recommendations of our alumni and business community, we have been asked to give the students experience in working in groups and speaking "on

their feet.” To meet with this desire, I make the requirement that each team member orally present a portion of the analysis and solution to each case. To do this effectively, I recommend that students practice their delivery before their team members before they come to class and make their presentations before the professor and students. I encourage them to make their analysis with emphasis that will show that they are convinced that they believe their solution is the right one. Even if they are not exactly right, their fervent presentation will get them praise from me and probably bring about a heated discussion among the class members. This is a desired result from the case discussion; other students who didn’t study the case will want to make comments and express opinions about the case,

Again, unfortunately, I have sometimes found that some students, for one reason or another, will ask team members who analyzed the case to write out a paragraph that they can read when their part of the case discussion takes place. It is with sorrow that I tell them that they have cheated on themselves and lowered the grade they could have made.

An overall written analysis is often required for large cases, but it is difficult to determine which team members wrote the written analysis. In some instances, the findings in the written analysis depart from what the students present orally. Because of this eventuality, the professor should get the written analysis in advance to be able to challenge the team about the varied findings. Short cases may not require a written analysis.

RECOMENDED STEPS IN CASE USE

While admitting that there are many variations in the use of case studies, the Eberly Center at Carnegie Mellon University has a six step format that seems very practical:

1. Give students ample time to read and think about the case.
2. Introduce the case briefly when you assign it and give some guidelines for analysis.
3. Create groups and monitor them to make sure everyone is involved.
4. Have groups present their solutions/reasoning. If a solution is required, make sure the responsible group makes a decision rather than talking only “about” the problem.
5. Ask questions for clarification and ask other class members to ask questions.
6. Synthesize the issues raised and come to a consensus as to what should be done.

CONCLUSIONS

Having used the case method of teaching for several years, I have become convinced that it is a good method, and maybe the best method for teaching some lessons in business management and probably in many other disciplines. I have used it in universities where it was never used before and students have voluntarily told me that they greatly enjoy studying using case studies and will retain more from the cases than the teaching from pure theory classes. Other professors may still prefer the use of theory to cases that illuminate practice and they are probably correct for many subjects. For my subjects in general management and project management, I find the case study method superior after the students have been exposed to enough theory that they can understand the problems and opportunities they are seeing in the cases they study.

For longer cases, the teams are required to present a written analysis in addition to the oral analysis. Both are beneficial in the learning process, but only in the oral presentations of individuals can it be seen how much they have ingested in studying the case.

There are several professional organizations that solicit cases for presentation at meetings. I have included some of my cases that were published either in symposia proceedings or professional journals. Thus new cases may be of interest to other professors and used in their classes.

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